

# Young Professionals Business Plan

## Progress Report

### 7 November 2017

This document serves as a progress report for the Young Professionals Business Plan projects for 2017-2019, in fulfillment of the pledge made to the MGA and IEEE Boards during the IEEE Meeting Series in November 2016. This report provides the overview of progress made during 2017 towards the implementation of the Young Professionals Business Plan. The full description and details of the Young Professionals Business Plan can be found in the extended document, available on the [IEEE Young Professionals website](#).

The report details, in order, the progress achieved as of 7<sup>th</sup> November 2017, on the following five projects that make up the Business Plan:

1. IEEE*Xplore* access for Young Professionals
2. Micro-Volunteering ( $\mu$ Volunteering)
3. Loyalty Program
4. Increasing presence at large-scale events (Signature Events and meetups)
5. Seed funding

Each of the projects included in the Business Plan were funded for research, pilots and data collection in 2017 under the purview of the Task Force assigned. The goal is to develop each project with their own unique measures of success, including data on behaviors, usage, satisfaction and prudent means of execution so that they may ultimately move from a project state into operationalized programs for engaging and retaining Young Professionals and the Institute as a whole.

This document will be made available to all stakeholders, who will be able to access it online at any time, with regular updates. The milestones, checkpoints, success metrics and deliverables mentioned in this report are only the ones related to 2017 Q3 and Q4, or directly concerning tasks that were scheduled to be performed at this time. For the full list of milestones and checkpoints, and success metrics and deliverables, please refer to the main Young Professionals Business Plan document.

# 1. IEEE*X*pl*o*re access for Young Professionals

## Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
✓ <i>Define platform requirements with IEEE Marketing and Sales team</i>	✓ <i>Research feasibility of content access models: rent vs. buy</i>	✓ <i>Investigate cost and access model for discounted YP member pricing package to existing MDL platform (YP-MDL)</i>	✓ <i>Evaluate corporate implications of YP-MDL</i> ✓ <i>Develop small-scale pilot proposal of YP-MDL</i>

## Current status overview

In 2017, the Task Force, in partnership with the IEEE Marketing and Sales and IEEE MGA staff teams, explored more affordable access models to technical content in the IEEE Xpl*o*re Digital Library for Full Grade YP Members (excluding Graduate Student Members). Several options for new delivery models were investigated. The latest of these outlined below calls for socialization and approval of a special package of the existing IEEE Member Digital Library (MDL) product to be piloted in 2018 with the following objectives:

- Gauge opportunity to increase MDL revenue
  - Identify success participation
- Obtain powerful data set with information about:
  - Implications to society membership
  - Implications to the IEEE membership
  - Implications on the content sales
  - Satisfaction rate
  - MDL usage
  - User Demographics
- Proposal for further development
- Understanding the dynamic in terms of different article purchase models

The next steps include Access, Development and Subscription. Accessing MDL means YP would utilize the same order and access process as the current versions of MDL. The commitment would be one month; this has changed from the original proposal of one year. The YPs would order the special version of MDL through the Member catalog and use their IEEE Web Account to access MDL.

Development would not take much time, given the use of the existing systems and platforms development is minimal and implementation would be quick.

The discounted subscription terms include:

- Annual subscription with monthly charge of \$9.99 for five downloads per month
- Downloads (PDF / HTML) remain accessible for annual subscription period
- Unused downloads will roll to future months if the subscription is in force; cancelled subscribers will lose access to downloads

While the YP Committee is looking to meet the technical content needs of YPs, the lower cost access has raised concerns among some stakeholders.

- TAB: Concerned about membership and loss of members
- MSD and TAB: Concerned about abuse and loss of product revenue
- MGA: Concerned about meeting need for more affordable access to technical content per segmentation studies, ensure harmony amongst the parties and support for the 2018 activities,

Currently, less than 1% of Full Grade YP Members subscribe to MDL. There are 414 YPs who subscribe to MDL, paying \$44/month, which represents \$18,216 of monthly sales. There are 91 YPs subscribed to MDL Basic, paying \$19.50/month, which represents \$1,774.5 of monthly sales.

### Challenges faced currently

- Lack of YP behavioral user data to indicate whether a discounted MDL offering specific to Full Grade YP Members would result in an increase or decrease in MDL revenue, Society memberships, IEEE*Xplore* revenue, etc. A small-scale pilot would provide such data to determine whether to continue with this project.
- It is unclear what the optimal article price point and commitment term should be. A small-scale pilot would provide business insights to help make these decisions.
- Concerns raised by project stakeholders have delayed the launch of a small-scale pilot.

### Success metrics and deliverables progress and achievements

Success Metric	Description and schedule
Number of purchases	More than 2% of selected pilot users purchase the offering. This would be an improvement over the current 1% usage of current MDL products by YP members.
Active user download rate	Active users will consume at least 3 out of 5 allotted article downloads each month.

### Financial Status

2017 Approved                      50K  
FYE 2017 Forecasted              25K

The Task Force recommends continued socialization and planning for a 2018 pilot to marketing.

## 2. Micro-volunteering (μVolunteering)

### Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
<ul style="list-style-type: none"> <li>✓ Define requirements and specifications</li> </ul>	<ul style="list-style-type: none"> <li>✓ Evaluate platforms and vendors (internal and external)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Vendor selection</li> <li>✓ Development</li> </ul>	<ul style="list-style-type: none"> <li>✓ Small scale sandbox pilot               <ul style="list-style-type: none"> <li>• Definition of Volunteering CV (vCV) concept (in progress)</li> <li>• Demo to IEEE Board</li> </ul> </li> </ul>

### Current status overview

Vendor identification and selection process that started in late March with assistance from MGA and IT, produced twelve vendors for consideration. These were evaluated by the Task Force in partnership with staff and two were shortlisted. The Task Force tested the frontrunner, Galaxy Digital at its August meeting and reviewed the accompanying proposal, finding it lacked key aspects of the proposed μVolunteering platform. As a result, it was decided that the team would pursue two different points of action: firstly, to determine if Galaxy Digital would provide the missing aspects, and secondly to research additional vendors for consideration. Galaxy Digital declined to make the adjustments requested to improve their offer. The team was referred to Higher Logic as they have an existing platform that had not been previously identified. Higher Logic was contacted, several initial meetings took place and it became clear that their infrastructure and feature set most closely matched the documented requirements. The shortlisted firms were put on hold while the team, with assistance from MGA staff/IT obtained and reviewed a Request for Information as well as performing initial due diligence surrounding Higher Logic's APIs, security, GDPR compliance, functionality, record refresh, load testing, encryption, integration monitoring, authentication, SSO/etc.

Higher Logic presented several advantages over Galaxy Digital, including knowledge of IEEE and relationships within the organization, longer experience in the field, a more stable platform and enhanced feature set. Because of these advantages, and the positive presentation during the initial calls and product demos, the Task force, along with support from MGA and IT staff, decided to proceed with Higher Logic for the purposes of conducting a sandbox environment pilot.

## Milestones and Checkpoints

Month	Checkpoint/milestone reached	Description
August	<ul style="list-style-type: none"> <li>Vendor Selection</li> </ul>	<ul style="list-style-type: none"> <li>Higher Logic has been selected as the vendor to help implement the online platform for this project.</li> </ul>
September	<ul style="list-style-type: none"> <li>Development</li> </ul>	<ul style="list-style-type: none"> <li>Developed specification was compared with the product of Higher Logic. A sandbox environment was negotiated for the purpose of testing the project and platform concept. Testing forum and later formal pilot developed together with IEEE Staff.</li> </ul>
October	<ul style="list-style-type: none"> <li>Small scale pilot</li> </ul>	<ul style="list-style-type: none"> <li>Sandbox environment was opened to testers on 18 October.</li> </ul>
November	<ul style="list-style-type: none"> <li>Demo and statistics for the Board</li> </ul>	<ul style="list-style-type: none"> <li>Several videos has been produced to showcase the platform to the MGA Board</li> </ul>
Each month	<ul style="list-style-type: none"> <li>Regular progress report meetings</li> </ul>	<ul style="list-style-type: none"> <li>Since the beginning of the relationship with Higher Logic, the Task force held near weekly virtual meetings</li> </ul>

## Success metrics and deliverables progress and achievements

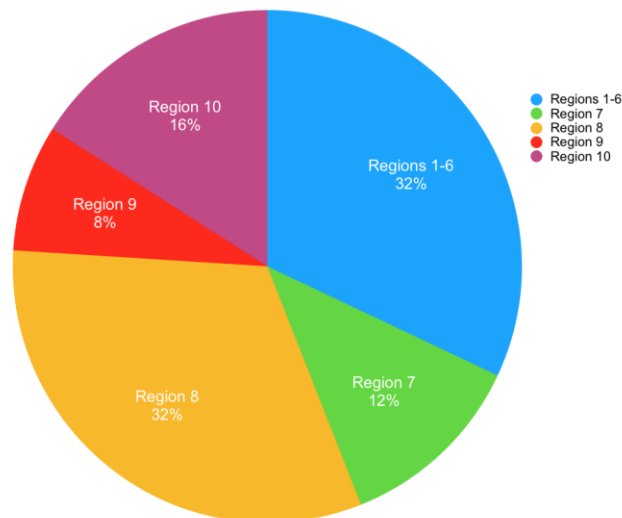
Success Metric	Description and schedule
Implementation and development progress	Request for Information obtained and reviewed in MGA, IT and legal/security teams for GDPR compliance, APIs, etc.
Pilot results	The results of the sandbox environment test are presented in the section below in detail. The main success metric in this instance was to have at least 70% of participants either satisfied or very satisfied with the platform. This metric was reached in full, and surpassed, since all testing participants rated their experience with the platform positively.

## Sandbox Environment Testing

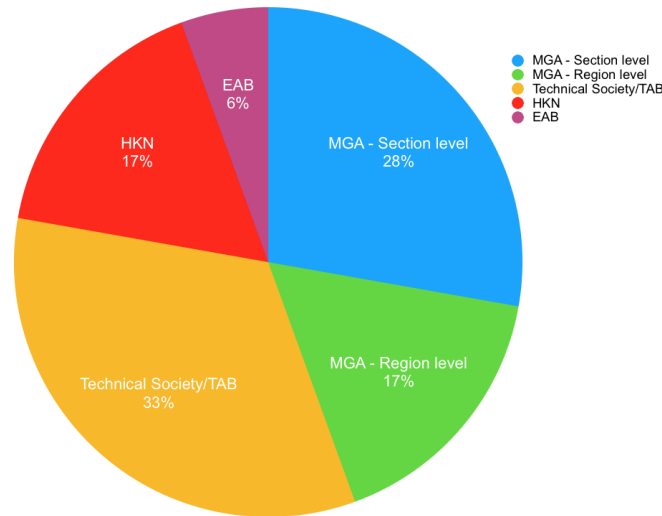
Higher Logic provided a sandbox environment that simulates the  $\mu$ Volunteering business requirements, albeit with limited graphic customization for the Young Professionals brand, and only the fundamental features enabled. This sandbox environment serves as the basis for the testing phase run in October 2017, in order to gain a better idea of what Young Professionals think about the concept and implementation.

In addition to the Task force members, invitations to participate in the pilot were extended to 22 Young Professionals volunteers, covering a wide variety of backgrounds, and 6 IEEE Staff members. Out of the 22 Young Professionals volunteers, 4 volunteers (from Regions 4, 6, and 7) did not reply at all to the invitation, while the remaining 18 accepted to be part of the pilot. In total, 31 participants were granted access to the sandbox environment. Graph 2.1 shows the geographic distribution of the 18 pilot participants who are not IEEE Staff, while graph 2.2 shows the participants' main IEEE OU affiliation (excluding Task force members). It is important to note that almost all participants are part of, or have been part of at some point, several OUs and different positions. This variety of IEEE experiences was considered a crucial feature of the pilot participants sample, in order to better understand the needs and views of a wide variety of Young Professionals members and volunteers. This variety is also the main reason why it was decided to adjust the previously set success metric of involving only Young Professionals Affinity Group volunteers. By having tested with a varied experience in IEEE, and belonging to different OUs, it would also help in developing the  $\mu$ Volunteering concept in a direction that would address the needs of all IEEE members, regardless of their affiliation, since the ultimate goal is to implement this project organization-wide.

Graph 2.1 - Geographic distribution of pilot participants (non-IEEE Staff)



Graph 2.2 - IEEE OU distribution of pilot participants (non-IEEE Staff)



All participants were provided with a spreadsheet containing tasks they should fulfill in the sandbox environment (image 2.1) and an extensive survey to provide their feedback. In addition to the survey, three different WebEx calls were organized to allow participants to engage in further discussion regarding the  $\mu$ Volunteering project idea and the platform.

For more detailed information about the sandbox testing results, please contact [yp@ieee.org](mailto:yp@ieee.org).

## Survey results

The feedback survey that was sent to participants contains 36 questions, covering all aspects of the sandbox environment. A total of 21 participants completed the feedback survey in full. Survey answers were not received from one Region 4 participant, one Region 5 participant, 2 Region 6 participants, 3 Region 10 participants, and 3 staff members (however, feedback was provided via other means). The survey results are detailed below, divided in several sections based on the questions' topic.

### First impressions: overall platform and homepage

All participants rated their first impression of the platform positively, with 54% of them stating it was very good. There were no negative answers in this matter. Regarding the ease of navigating the platform, 71.4% of participants rated it as easy. The usefulness of information provided, along with the ability of the homepage to clearly communicate the purpose of the platform, received the highest satisfaction ratings among all features related to first impressions (as stated by over 76% of participants).

Layout and graphics received the poorest feedback in this category, with only 29% of participants thinking they were good, while 23% rated them as poor. This is a direct result of the deliberate choice of not implementing fully developed graphics, due to the fact that it would have taken considerable time which the task force deemed more productive to invest in testing the basic



platform. Further feedback regarding the graphics of the platform will be provided in the WebEx calls feedback section below.

The ability to customize the platform and the level of personalization were deemed as areas that can be further improved, according to approximately a third of respondents.

Participants took the opportunity of providing further comments in the free-text boxes available. Over half of the comments agreed that the information provided was extremely useful, yet to make it even more attractive the home page layout should be optimized.

### **Platform features - user profile and personalization**

The majority of participants stated they were indeed able to find all the features they were expecting to find, or that they had to use during their testing (76.2% of participants). Furthermore, 47.6% of participants found it very easy to update their personal profile, and provide more details about themselves, with the remaining participants rating the experience as easy. There were no participants who found this aspect difficult.

One feature related to the user profile that five respondents mentioned is the ability to connect to the main IEEE member profile, in order to retrieve data. This is one of the main features the task force has planned for the  $\mu$ Volunteer platform, so this feature will be implemented in the final platform before it will be launched.

More than 76% of respondents found the feature to view your past volunteering engagements either useful or very useful, suggesting that the concept of a volunteering CV would be of interest to users.

### **Interacting with other users**

Since the  $\mu$ Volunteering platform aims to have a social element to it, where users can connect to other volunteers, it was encouraging to see 86% of participants rating user interaction as satisfactory or very satisfactory (in terms of finding and adding new contacts on the platform, messaging other users, or posting in the forum).

### **Volunteer opportunities**

Survey data shows that participants were overall satisfied with the platform's ability to create, share and browse volunteering opportunities: 71% of participants found it either easy or very easy to create and share new volunteering opportunities, 90% of them consider that the platform provides all necessary features and tools to clearly and precisely formulate opportunities, and 95% of them found the process of browsing available volunteering opportunities very useful.



Suggestions for improvements were related to the method of creating new volunteering opportunities. One respondent stated:

*Maybe, you can think about a two-level volunteering realization, namely, for the simple tasks can be a simple form and for the tasks which need specialization can have a different, more complex form.*

## Volunteer recognition

There are a number of built-in features for recognition within the Higher Logic platform, with options to customize. Since this aspect ties in with the loyalty project in the Business Plan (next chapter in this document), this provided an opportunity to get initial input on the rewards concept to be further tested in the larger scale pilot slated for 2018.

Opinions on this topic were divided amongst participants, however 52.4% of them were fully in favor of awarding volunteers points, with only 14% being against it. Despite the strong support for this recognition system, 57% of participants were not sure how it would actually impact volunteers' motivations and drive to actively contribute to IEEE. Some participants suggested more personalized means of providing recognition, or using success stories to highlight dedicated volunteers. Comments on this topic provided by participants include (unedited):

*Respondent 1: I guess it can work, but the way it's applied must be carefully implemented. How do you choose who the volunteer of the month is?*

*Respondent 2: I think it's a great feature. The success will mainly depend on what volunteers are highlighted and how. By highlighting volunteers new to IEEE it will only encourage others to participate.*

*Respondent 3: At a global level the impact would be less vs. if these volunteers were identified at Regional level or a narrow geographic area relevant to me.*

*Respondent 4: I love it!!*

*Respondent 5: I definitely believe that "Volunteer of the Month" feature discourage new or inexperienced volunteers. Because this is something voluntary, not by force. So a new member will be always aware of that if he/she contribute more, one day he can be the top. But if he/she will not contribute, this feature will not be the reason to lose motivation*

*Respondent 6: I think it will be good for all sorts of volunteers regardless of their previous experience. It will give us the boost to go for it and try to*

achieve more. One thing that could be done is that we can give this title for more than one volunteers. Like the top 3 will get the title for the volunteer of the month.

*Respondent 7: Good, as long as it is a different person each month, and you can't see how many points they have. Points should not be visible - it will encourage people to cheat the system if they want to "catch up" to another volunteer. Perhaps the Volunteer of the Month should be for the local Section or Region? It seems a little excessive to make this a global category because there will be thousands of volunteers on the platform.*

*Respondent 8: It is a good idea. Maybe, you can restart the counter in every month - and save the monthly values in a hidden way. Based on the a volunteer of the year could be also defined.*

*By restarting the public monthly counter it could be avoided the disappointment of less experienced/fresh users.*

*Respondent 9: It would be nice to have but it needs to be very careful with that. We don't want to end up with student pursuing only volunteering actions which brings more points. In this way we can end up with "dummy" opportunities which will only boost points in order to get recognition.*

*Respondent 10: I think it could discourage new and inexperienced volunteers, since they might not have as much time or commitment to dedicate to volunteering at first.*

### **WebEx calls feedback**

The WebEx calls proved to be highly successful, generating in-depth discussion about the  $\mu$ Volunteering project as a whole, and the platform. Below are some of the comments provided by participants:

*Participant 1: I like the idea of having a centralized place for opportunities. It would be nice to have a uniform interface for groups from all around the world to see opportunities from all around - volunteers are always on the move and might be interested in various locations. This gives you a bigger network to choose [volunteering opportunities] from. The tool can also be used to engage student members so they become more familiar with Young Professionals and can become YP volunteers once they graduate.*

*Participant 2: I think this will really help different regions and organization units to connect people together. It will motivate people to volunteer more and be active. You can use your talents/skills in events you may not know about.*

*Participant 3: It is really useful that you can dedicate some volunteer tasks and you can easily connect with a large audience. Technical Societies don't have such a sophisticated solution yet, even though they have been exploring the concept. Facebook is convenient but not the platform needed for volunteering. Also, this platform is by far more user friendly and useful than Collabratec.*

*Participant 4: I wouldn't be joining it for career help but to network. If we have people in the platform from various industries and ages then there is more content to be developed. For example for me what I would like to see is people who just graduated, who I can mentor but I'd also like people who are older who can give me advice. It is a good way to engage the students once they are done with college. Collabratec tried to help with this but it did not work. Meet-ups are a very good thing and a way to start but since we cannot have it all the time, this platform allows for constant contact. The biggest challenge I see is that people are not ready to take first step, so there needs to be a way to make them comfortable to engage on the platform and to make them feel safe in doing so.*

*Participant 5: There will be a lot of people with focused skills, In order for it be successful there needs to be opportunities for every interest, we need to make sure we keep people around incase they dont find anything that is related to them. You need people to communicate and have a platform to see what is going on - no matter what size the event is. Everyone does not have a lot of time, and their time may vary year to year this platform allows them to stay involved no matter what level the commitment is.*

Based on the sandbox pilot results, the Task force recommends that that a formalized contract be negotiated with Higher Logic for 2018 activities to include a larger scale pilot and associated marketing.

### **Challenges faced currently**

- The current schedule has been delayed by approximately 2-3 weeks, with the IEEE Sections Congress in August 2017 putting significant strain on the team in order to accommodate all tasks and duties. Nevertheless, all planned activities and milestones for 2017 are expected to be reached before the end of the year, with tentative milestones for 2018 already in development.

### **Financial Status**

2017 Approved	25K
FYE 2017 Forecasted	0K (vendor agreement/pilot with SSO integration)

**Demo video of the testing platform is available [here](#).**

### 3. Loyalty Program

#### Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
✓ <i>Scope and consider requirements and intersection with μVolunteering</i>	✓ <i>Preliminary journey mapping and committee engagement</i>	✓ <i>Identify and retain consultant(s) and document deliverables via Service Agreement</i>	<ul style="list-style-type: none"> <li>• Conduct month long Loyalty Assessment/feasibility study and report findings at February 2018 Board Series (moved from November)</li> </ul>

#### Current status overview

After the journey mapping exercise (see June progress report) with the full Young Professionals Committee, the Task Force recognized the broad scope and potential impact of the loyalty project and embarked upon research to identify consulting firms in the loyalty and rewards space, with plans for conducting a feasibility study. Many of these firms cater to retail operations or food and beverage providers or are offering pre-built platforms specific to these industries. It took more time than anticipated to find a firm that could assist with a feasibility study and customized strategy development and implementation, should this be deemed warranted.

Our research suggests that what young professionals want and increasingly expect from IEEE is more intrinsic to the end to end experience itself. This means we need to move beyond individual or disjointed touchpoints and monetary incentives into a more holistic approach which:

- respects and saves members' time
- makes involvement markedly easier for members and volunteers
- adds knowledge and access to encourage intimate and unique brand attachments
- centrally manages cumulative member experiences across IEEE
- improves sense of belonging and recognition for member and volunteer users
- improves activity reporting and increases visibility of events and programs
- helps IEEE better understand engagement levels and predict behavioral patterns that drive product and program development
- Dovetails with uVolunteering to help successful and high potential members and volunteers engage and advance throughout the organization

The Task Force, with assistance from Senior Management in MGA, identified, engaged and solicited a proposal from [rDialogue](#). The next course of action is to employ its methodology and conduct a Loyalty Assessment over four weeks between 20 November and 20 December to define and quantify the loyalty opportunity at IEEE with a focus on key business goals. For more detailed information about the loyalty proposal, please contact [yp@ieee.org](mailto:yp@ieee.org).

During the Assessment, the following key questions will be answered:

- Which member segments present what opportunities? What risks exist?
- How should relationship marketing (member communications) integrate with the loyalty strategy?
- Can we bring the program to market in a way that will be well-received by members?
- What existing IEEE assets can we leverage to deliver a loyalty proposition?
- What needs to be accomplished for the organization to support a loyalty marketing investment?
- Will the resulting marketing strategies create a competitive advantage?
- Do we have the right technology platform to support the loyalty and member marketing needs?
- What other technology considerations should be addressed?

Loyalty Assessment Objectives and Outputs:

- Define and quantify the loyalty opportunity using 360 degree perspective
- Set parameters and objectives for loyalty solutions
- Align to what loyalty means for IEEE
- Guide appropriate strategies and program concepts while supporting internal alignment
- Benchmarking other societies tactics and strategies
- Developing initial economics and objectives
- Evaluation of existing relationship marketing activities and member experience
- “brief” for loyalty recommendations, including specific evaluation criteria
- Assistance in aligning the project with broader stakeholders within the organization



➤ **360° Assessment:** Understand and define the business and loyalty opportunity relative to the member, IEEE and the competitive landscape

- Foundation setting via 2 – 3-hour discovery work session with key and diversified stakeholders
- 6-8 additional stakeholder interviews to finalize the discovery process and provide additional perspectives
- Review existing plans, data, operations, communications and metrics
- Confirm value definition for member segments and brand/utilization/financial metrics

➤ **Existing member analysis:** Analyze member behaviors, activity and engagement

➤ **Loyalty Assessment Workshop:**

- ½ Day Workshop with Marketing / Key Stakeholders to vet assessment implications; explore initial program strategies and quick wins (initial brainstorming)

➤ **Board Presentation:** Develop collateral for Board update on preliminary assessment and project progress

➤ **Define IEEE Loyalty and Relationship Marketing Opportunity:** Relative to the member, business and competitive landscape, including supporting metrics, desired behaviors, target members, loyalty objectives, opportunities, parameters and risks

➤ **High Level Business Case:** Sizing the financial opportunity for a new loyalty program, making the case for loyalty

➤ **Identify Key Loyalty Implications:** For strategy and design, addressing opportunities, bounds and constraints

➤ **Set Evaluation Criteria:** Used to weigh alternatives in Recommendation phase, relative to competition, economics, member value and engagement

➤ **Member Analysis:** Review of member behavior, activity and engagement metrics.

➤ **Loyalty Assessment Board Presentation:** Develop and deliver presentation to of preliminary findings and project update

### Stakeholder Composition for 360 Assessment

Representatives from the following units will be identified and interviewed:

- Leadership / Board: Provides visibility into the organization and views from the top regarding the role of, and expected impact of, member engagement and loyalty
- Membership: Provides input into the member lifecycle, including:
  - Acquisition – How members are acquired
  - Member Experience – How members are nurtured and engaged
- Marketing/Communications/ Branding: Role of communications and the brand in member engagement
- Data and Technology: Understanding your technology environment, especially in regard to communications (email) and enabling loyalty
- Publications/Research, Conferences, Standards, Communities, Education, Technical Activities etc.: Understanding the different product verticals and how members engage with them

- Customer Service: Understanding typical questions from members
- Finance/Reporting: Understanding the financial model of the organization, how revenue is generated by members, and how IEEE measures member value

## Milestones and Checkpoints

Month	Checkpoint/milestone reached	Description
July	<ul style="list-style-type: none"> <li>• Vendor research and identification</li> </ul>	<ul style="list-style-type: none"> <li>• Prelim introduction to rDialogue</li> </ul>
August	<ul style="list-style-type: none"> <li>• Hiatus</li> </ul>	<ul style="list-style-type: none"> <li>• Sections Congress and scheduling challenges</li> </ul>
September	<ul style="list-style-type: none"> <li>• Negotiations Begin</li> </ul>	<ul style="list-style-type: none"> <li>• F2F meeting and scope of work</li> </ul>
October	<ul style="list-style-type: none"> <li>• Development and review of proposal</li> </ul>	<ul style="list-style-type: none"> <li>• Staggered approach and consideration of 2017 completion of Phase 1 Assessment</li> </ul>
November	<ul style="list-style-type: none"> <li>• Contract negotiation and scheduling</li> </ul>	<ul style="list-style-type: none"> <li>• Master Services Agreement, Nondisclosure Agreement and Statement of Work reviewed and submitted to legal and procurement</li> </ul>
December	<ul style="list-style-type: none"> <li>• Loyalty Assessment over 4 week period</li> </ul>	<ul style="list-style-type: none"> <li>• 360 degree interviews and discovery phase completed</li> </ul>

## Success metrics and deliverables progress and achievements

Success Metric	Description and schedule
Implementation and development progress	Deliverables: feasibility study conducted- conclusive and actionable report for consideration at February 2018 Board Series instead of November 2017.

## Challenges faced currently

- The initial schedule was revised by approximately 3 months due to scheduling difficulties and delays in identifying and evaluating suitable vendors hence the findings to be forward February 2018

## Financial Status

2017 Approved	75K
FYE 2017 Forecasted	40K



# 4. Increasing presence at large-scale events (Signature Event and Meet-ups)

## Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
<ul style="list-style-type: none"> <li>✓ <i>Finalize funding platform</i></li> <li>✓ <i>Marketing campaign start</i></li> </ul>	<ul style="list-style-type: none"> <li>✓ <i>Evaluate funding platform usage and needed adjustments or changes</i></li> <li>✓ <i>Create fund usage projections</i></li> <li>✓ <i>Create feedback system for event organizers</i></li> </ul>	<ul style="list-style-type: none"> <li>✓ <i>Analysis of funding usage</i></li> <li>✓ <i>Reevaluate Signature events criteria</i></li> <li>✓ <i>Launch event attendees experience surveys</i></li> <li>✓ <i>Identify possible large-scale non-IEEE technical events where signature events can be organized</i></li> </ul>	<ul style="list-style-type: none"> <li>✓ <i>Create report for IEEE Board regarding the usage of funding</i></li> <li>✓ <i>Analyze impact and outcomes of Signature events</i></li> <li>✓ <i>Start organization of 2018 main signature events (in progress)</i> <ul style="list-style-type: none"> <li>• <i>Make any needed adjustment to seed funding criteria</i></li> </ul> </li> </ul>

## Current status overview

Meet-up funding proved to be an astounding success in 2017, having the highest rate of applications, and being the first type of Young Professionals funding to be depleted (in August 2017). Signature events also drew attention from several Regions, increasing collaboration across multiple IEEE OUs. The following section provides in-depth information regarding the performance of both meet-up funding and Signature events.

The completed Meet-up events as of the time of writing this document are:

- Young Professionals Events for International Microwave Symposium 2017, Hawaii, Region 6
- Young Professionals at 2017 Great Lake Symposium on VLSI, Alberta, Region 7
- IEEE Jordan Section Gathering, Jordan, Region 8
- IEEE Young Professional Meet Up at 2017 WIE ILC, San Jose, Region 6
- IEEE Young Professional Meet Up & Technology Boot Camp at WIE International Leadership Summit, Goa, Region 10
- RFID 2017 IEEE Young Professionals Meet-up, Phoenix, Region 6
- 2017 IEEE International Instrumentation and Measurement Technology Conference Young Professionals Panel, Italy, Region 8
- Young Professionals Lebanon Congress 2017, Lebanon, Region 8
- IEEE International Systems Conference 2017, Montreal, Region 7

- IEEE Young Professionals Cross-Section Conference Social Event Seattle, Vancouver, Oregon BC Groups, Seattle, Regions 6 and 7 collaboration
- Industry Networking Night with IEEE Presidents, Victoria Section, Region 10
- Australia and New Zealand Student & YP Congress, Australia, Region 10
- Oregon Section Social During Area Meeting, Oregon, Region 6
- Meet-up at WIECON Indonesia, Indonesia, Region 10
- WIE International Leadership Summit in Krakow, Poland, Region 8
- Young Professionals meet-up at the 19<sup>th</sup> European Conference on Power Electronics and Applications 2017, Poland, Region 8
- SYP China Congress, Beijing, Region 10

The completed Signature events as of the time of writing this document are:

- RadarConf 2017, Seattle, Region 6
- EUROCON 2017, Republic of Macedonia, Region 8
- IEEE Honors Ceremony, San Francisco, Region 6
- European Microwave Week 2017, Nuremberg, Region 8

### Milestones and Checkpoints

Month	Checkpoint/milestone reached	Description
<b>July</b>	<ul style="list-style-type: none"> <li>• Initiate funding user satisfaction survey</li> </ul>	<ul style="list-style-type: none"> <li>• Survey was deployed in August, together with the event attendees experience survey. It contains 13 questions. Results from this survey are detailed further in this chapter.</li> </ul>
<b>August</b>	<ul style="list-style-type: none"> <li>• Identify large scale tech events in 2018 where Signature events can be organized</li> <li>• Launch event attendees experience survey</li> </ul>	<ul style="list-style-type: none"> <li>• As of November 2018, Rising Stars, SXSW, and IEEE Honors Ceremony have been identified to host a Young Professionals Signature event in 2018. The taskforce is concentrating on improving the model of Signature events before additional events are approached.</li> <li>• The event attendees experience survey was launched in August 2017, consisting of a standard format, with 7 questions. Further details and result analysis are provided below in following sections.</li> </ul>
<b>September</b>	<ul style="list-style-type: none"> <li>• Prepare project overview and outcomes report for the IEEE Board</li> </ul>	<ul style="list-style-type: none"> <li>• Project overview and outcomes are included in this document, further in this chapter. Furthermore, several other documents have been issued on this topic between September and November to relevant parties upon their request.</li> </ul>
<b>November</b>	<ul style="list-style-type: none"> <li>• Commence negotiations process with tech events to host Signature events in 2018</li> </ul>	<ul style="list-style-type: none"> <li>• Funding and organizational requirements from the side of IEEE Young Professionals have already been established for Rising Stars, SXSW and Honors Ceremony.</li> </ul>

## Success metrics and deliverables progress and achievements (status)

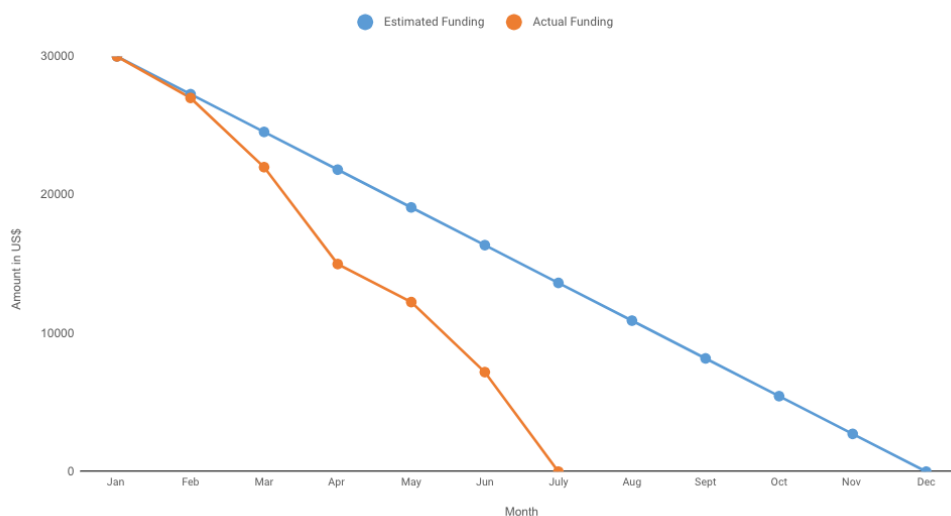
This section details the success metrics and deliverables for 2017, as agreed upon and presented to the MGA Board at the June Board Series 2017. The name or title of the success metric or deliverable is presented in **bold**, followed by a short description and status review in detail.

1. **Signature events funding requests**: approve funding for 5 Signature events and 15 meet-up events at conferences.

This success metric has been met, and surpassed by a significant margin by November 2017.

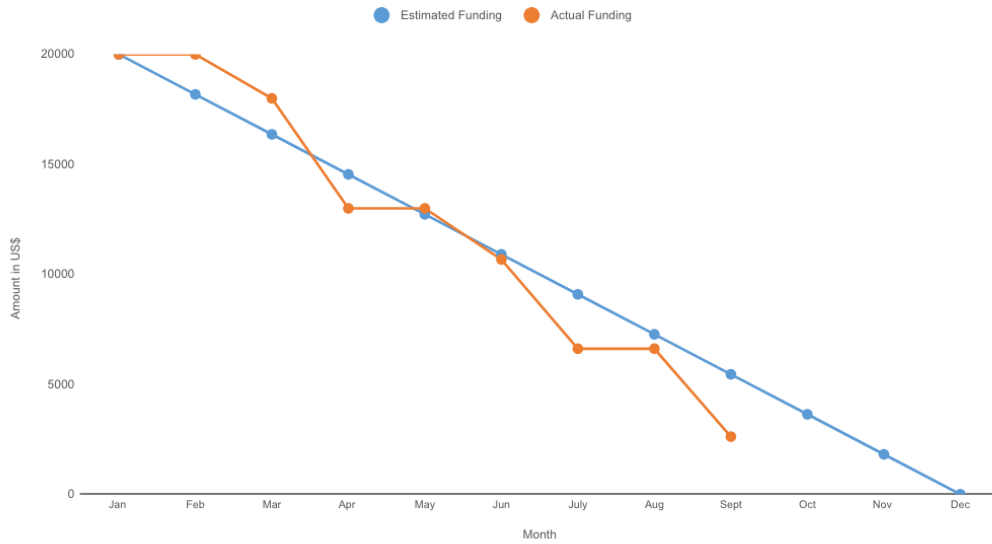
As mentioned previously, Meet-up event funding was a formidable success in 2017, standing out from all other types of funding. A total of 21 events were funded through the Meet-up opportunity, each event receiving the maximum amount available of US\$1,500. As seen in graph 4.1, the available funds were depleted in July, prompting the closing of this type of funding opportunity in August. As of the time of writing this report, 17 of the approved 21 events have taken place, submitted the required follow-up materials, and had their funds issued. One event failed to submit the required follow-up material within the stated deadline of one month (with two additional one-month extensions, bringing the total time period to three months), leading to the funding being revoked, and funds not being issued.

Graph 4.1 - Meet-up funding issued per month in 2017



Signature events also proved popular, with 7 such events being funded this year. At the time of writing this document, 4 of these events have already taken place, with 3 of them submitting the required follow-up materials and having their funds issued. Funding varied for each event, with the amount tailored to the needs and format of the host tech event. Individual funding ranged between US\$1,880 and US\$5,300. Graph 4.2 illustrates the allocation of Signature event funding per month during 2017.

Graph 4.2 - Signature event funding issued per month in 2017

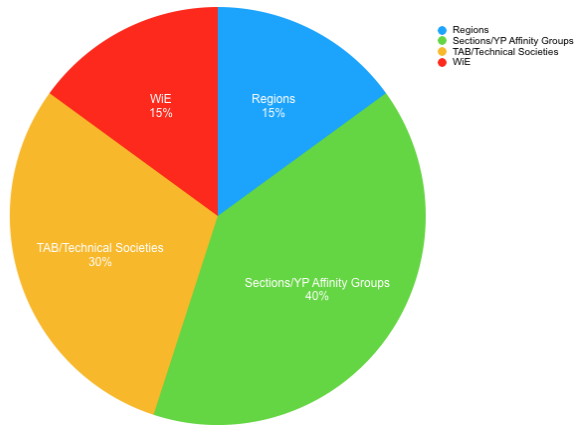


2. **New internal and external collaborations:** improve collaborations with other organizational units within IEEE. Identify organizational units who are interested in working together, understand their needs and what Young Professionals can offer them, and establish a joint project format (meet-up or Signature event).

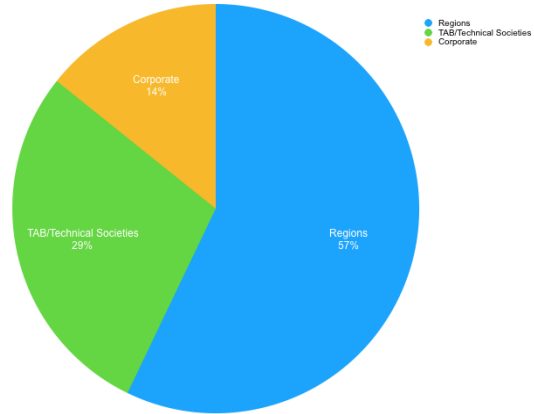
Both Meet-up events and Signature events have proven a high degree of collaboration, involving a wide variety of IEEE OUs, in addition to external partnership at local levels. Because of this, we have seen a significant increase in collaborations between Young Professionals at all levels and other IEEE OUs, especially TAB and technical societies. This is a significant benefit in increasing the diversity of Young Professionals communities worldwide, strengthen relations between OUs within IEEE, improve the networking experience at such events, and disseminating knowledge and experience between members and volunteers of different backgrounds. Graph 4.3 shows the main OUs responsible for organizing a Meet-up event, while graph 4.4 shows the main OUs responsible for organizing a Signature event.

Although we have set new collaboration with various external partners, no MoU has been signed due to specific IEEE financial cycle that does not allow use to make any commitments before finalizing our budget.

Graph 4.3 - Main IEEE OU responsible for organizing a meet-up funded event



Graph 4.4 - Main IEEE OU responsible for organizing a signature event



All Signature events that have been funded in 2017 take place in conjunction with IEEE large-scale or high-impact events (2017 IEEE RadarConf, 2017 IEEE Honors Ceremony, 2017 IEEE EUROCON, Hard Tech Summit 2017, and Rising Stars 2018), with the exception of two events, which are hosted during the European Microwave Week 2017 and the Austin Developer week 2017.

The lower proportion of non-IEEE events can be attributed to the year-long runway that is required for preparation and exhibition. Seeing as Signature event funding went through transformations for 2017, the final guidelines and budget were not established until mid to late January 2017, leading to extensive difficulties in securing suitable involvement of Young Professionals at high-profile non-IEEE technical events around the world. Once the Signature event model stabilizes, such endeavors will become more easily achieved, with planning possibly spanning several years.

Meet-ups attracted significant interest from the side of Technical Societies and Chapters, who organized a third of this year's meet-up events. Nevertheless, there was an equal division between technical and non-technical sessions, workshops or presentations organized as part of meet-up events, in addition to networking sessions which are the key defining feature of such events. The popularity of meet-ups has been highlighted by organizers and attendees alike as being the one feature they were missing in the IEEE membership experience, namely the opportunity to interact and engage with other professionals from different fields and backgrounds. This aspect also plays on the social element and desire to increase the circle of professional acquaintances, both being of high interest to young individuals.

### 3. Media coverage:

- a. Amount of media content generated through Signature events. This content can include, but is not limited to: online articles, blog posts, social media posts, coverage in any form of print media, either internal (IEEE publication) or external.
- b. Minimum of 100 unique engagements on social media platforms related to content from Signature events. Social media platforms include, but are not limited to, Facebook, LinkedIn, Twitter, Instagram.

Facebook posts promoting the events reached a total of 63,421 users, and a total of 979 unique posts clicks and 457 unique user reactions. There were no materials shared post-events.

IEEE YP Facebook page went “live” during the European Microwave week and reached 1,045 unique users. The live video had a total of 63 minutes viewed, the entire length of the video was 17 seconds.

The promotion of events was fairly successful, the coverage of events after completion was nonexistent. Promotions were only posted on Facebook, and we did miss out on higher levels of exposure by not utilizing LinkedIn, Twitter, and Instagram. Improvements to media coverage is already being developed and will be implemented before the year end.

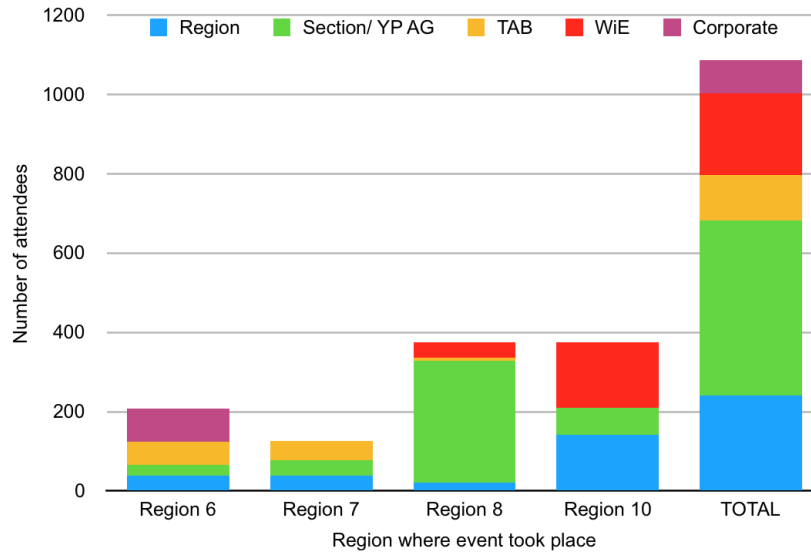
#### **4. Estimation of members and non-members involved:**

- a. 3000 IEEE members attend events in total.
- b. 1000 non-IEEE members attend the events in total.

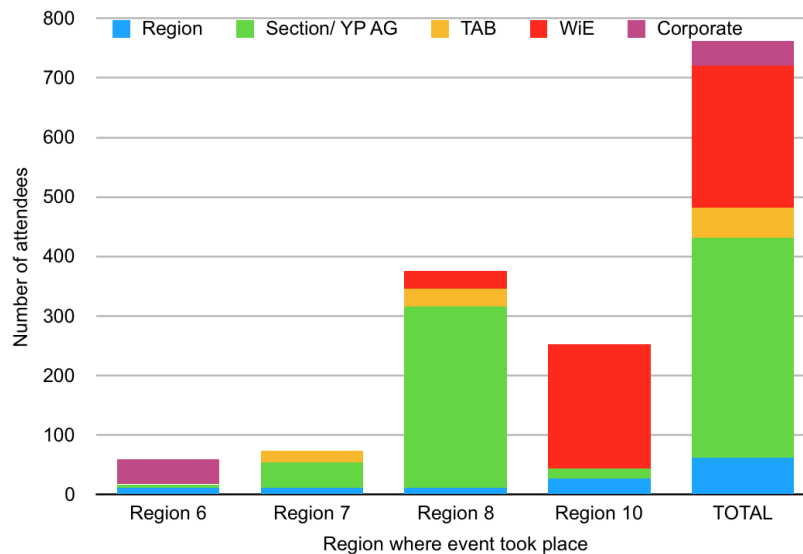
Overall, meet-ups and Signature events that have taken place up until the writing of this document, and have submitted the required follow-up materials (totaling at 16 meet-ups and 3 Signature events), have been attended by 2,069 participants. Out of these, 1,080 were IEEE members and 750 were non-IEEE members. In addition, two meet-ups held in Region 6 submitted only the overall number of attendees, without the explicit break-down between IEEE and non-IEEE members. This number added up to 239 attendees. This means goal 4.a was achieved in proportion of 36%, while goal 4.b was fulfilled by 75%. Overall, the goal of having 4000 attendees in total was achieved 51.72%.

In order to better understand the types of events and geographical areas that may attract an elevated number of attendees, graphs 4.5 and 4.6 provide a detailed break-down to these numbers based on Region, main organizing OU, and numbers of IEEE and non-IEEE attendees. It is important to note that the graphs do not include the amount of participants where clear division between IEEE and non-IEEE members was not made.

Graph 4.5 - Number of IEEE attendees divided by Region and by main OU event organizer



Graph 4.6 - Number of non-IEEE attendees divided by Region and by main OU event organizer



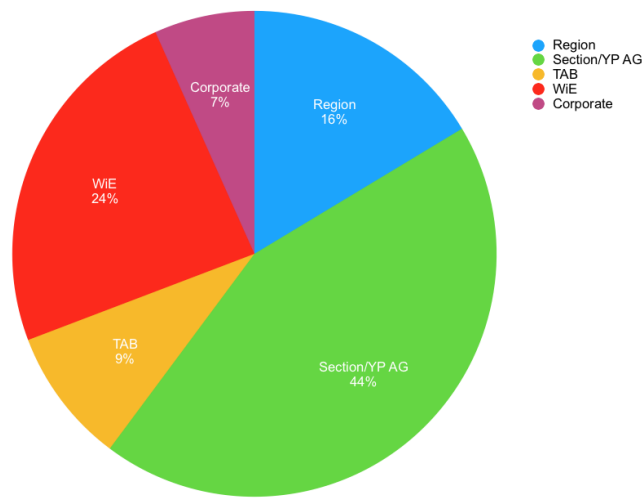
Several interesting factors arise from the above graphs, in terms of what type of events are more likely to attract most attendees in various Regions. For example, while Regions 8 and 10 have considerably more attendees overall than Regions 6 and 7, there is a lack of TAB or Technical Society hosted events. In Region 8, Section or Young Professionals Affinity Group events are most common and provide the highest attendance, while in Region 10 WIE events prove to be most popular. Within Region 8, there was a clear distinction between geographical areas regarding number of attendees. Middle East events (in Lebanon and Jordan) attracted over 433 attendees. No such distinction between number of attendees in different areas of a Region were



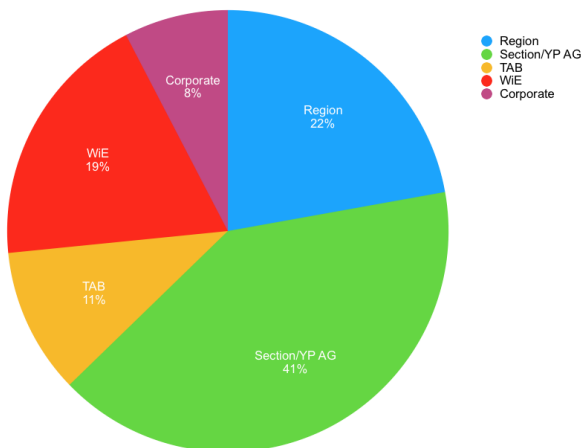
found in the other Regions. Regions 6 and 7 tend to have more TAB or Technical Society or Chapter events, with attendees at such events roughly matching those at events held by the Region or Section/Young Professionals Affinity Groups (especially in the case of Region 7). Region 6 has the lowest number of non-IEEE attendees, which can lead to several assumptions, such as poor knowledge or visibility of IEEE outside the organization, poor publicity, or events being relatively closed to non-IEEE members. Nonetheless, concrete data on this matter is not available, so no decisive results can be presented.

Graph 4.7 provides a view of the percentage of attendees divided by main event organizer (in terms of IEEE OU), while graph 4.8 provides the proportion of IEEE members attending events, and graph 4.9 provides the proportion of non-IEEE members at events.

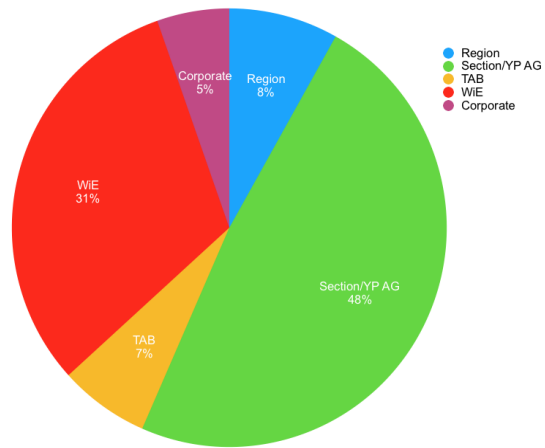
Graph 4.7 - Proportion of overall event attendees divided by main event organizing OU



Graph 4.8 - Proportion of IEEE member event attendees divided by main event organizing OU



Graph 4.9 - Proportion of non-IEEE member event attendees divided by main event organizing OU



While TAB or Technical Society or Chapter organized events represent about a third of all funded meet-ups and Signature events, they generate the lowest number of attendees, with only 11% of total number of IEEE member attendees being generated by these events. This is particularly interesting to observe, and further investigation should be conducted in order to identify factors that lead to this unbalanced result, and deriving suitable remedies to improve the situation. While the collaboration between Young Professionals and TAB (and TAB-related OUs) has increased significantly during 2017, the low impact generated by this collaboration and local events points to potential shortcomings in the current model. Understanding the causes can be of great benefit both in terms of engaging more young members in Technical Societies, but also in providing more high-quality technical content and easier access to it to Young Professionals, thus benefitting both parties involved.

Contrastingly, while WiE is the main organizer for only 11% of all meet-ups in 2017 (they were not the main organizer of any of the Signature events in 2017), they generate 24% of all IEEE member attendees, and 31% of all non-IEEE member attendees.

Overall, events organized by Sections or Young Professionals Affinity Groups generate the highest proportion of attendees, namely 44% of all IEEE member attendees and 48% of all non-IEEE member attendees, while organizing a third all meet-ups (they were not the main organizer of any of the Signature events in 2017). This may be due to the fact that being local volunteers, organizers from the Section of Young Professionals Affinity Group level have a better grasp on the local membership base, individuals' needs and interests, how to best promote events, and what event format and topic would be most interesting. However, in the case of the majority of TAB or Technical Society or Chapters led events, local volunteers were involved in the organizing process as well; should the assumption that local volunteers have a better grasp on local members hold true, what was different about TAB events organized in this manner?

## **Event Organizers Satisfaction Survey Review**

The event organizers survey consists of 13 questions assessing a variety of factors, such as funding platform performance, pre-event application requests, and post-event required follow-up material. The survey is sent to all applicants of successful events (meaning events where funding was approved), once the event took place. At the time of writing this report, 18 applicants have answered the survey, two of them providing incomplete feedback. Out of these 18 applicants, two of them have received two types of funding (STEP and seed funding), and one of them received all four types of available funding (STEP, meet-up, Signature event and seed funding) - this person is also the only respondent to have received Signature event funding. Overall, there were 6 respondents who have received meet-up funding. Detailed analysis of the answers is provided in the following sections.

## Funding platform review

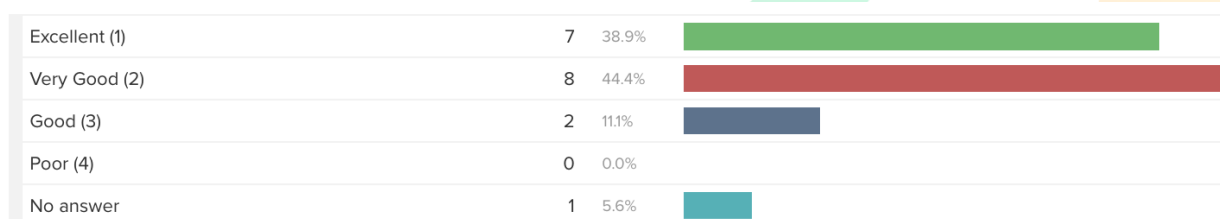
Two main questions aim to assess applicants' opinion regarding the funding application platform, detailed below.

**Question 1:** How would you rate your experience of the funding application platform?

This is a multiple choice question, where respondents can choose one option between “Excellent”, “Very Good”, “Good” or “Poor”.

The answer that was most common to this question is “Very Good”, with 44.4% of respondents choosing this option to describe their experience with the funding application platform. There were no respondents stating they had a “Poor” experience. Graph 4.10 details the frequency of answers to this question.

Graph 4.10



While the majority of meet-up funding recipients stated they had an “Excellent” experience of the platform in question, the one Signature event recipient stated they had a “Good” experience.

**Question 2:** Did you ever face and technical issues on the funding platform?

This is a yes or no question, with respondents who answer “yes” being prompted to provide further details in a free-text box.

While the majority of respondents indicated they did not encounter any technical issues while on the platform (83.3% of responses), there were two respondents who did encounter technical issues, and one who did not answer the question at all. The respondent who received all four types of funding was one of the individuals who faced technical issues.

Further details on these issues reveal that none of the issues presented are in fact technical. The comments provided by the two respondents who replied “yes” to the main questions are:

*Respondent 1: Meetup funding became unavailable towards the end of the year - a heads up would have been helpful. Also more clear definition on what qualifies for Meet-up funding or Signature funding would be helpful.*

*Respondent 2: Sincerely, I don't consider a technical issue, but I can't go back to previous page to change this option. I'll describe my opinions about follow-up docs on the follow text box.*

## Pre-event process feedback

One question addressed the pre-event process, including aspects such as submitting a funding application and the timeframe required.

*Question:* The current funding process requires to submit funding applications at least 4 weeks prior the event. How do you evaluate this time frame?

This was a multiple choice question, where respondents could choose one of the following answers: “Quite enough time”, “Need a week more”, “Need two weeks more” or “2 Months will be perfect!”.

The overwhelming reaction to this question was that 4 weeks is enough time (88.9% of responses), while one respondent stated they would like to have one more week, and one respondent did not provide an answer. There were no answers suggesting 2 additional weeks or 2 months would be desirable.

## Post-event feedback

The survey provides three questions which address aspects of the post-event process, such as time to submit the required follow-up material and transfer of funds.

*Question 1:* Were you able to submit the required follow-up material on time after the event?

This is a yes or no question.

All respondents who received meet-up funding or Signature event funding replied that they were indeed able to provide the required follow-up material within the 4-week deadline. The required follow-up materials are a report on the event, a list of all attendees (containing information such as name, email, affiliation, and whether or not they are an IEEE member), and any available photos or visuals.

*Question 2:* Are you satisfied with four weeks time window for the follow-up material to be submitted after the event?

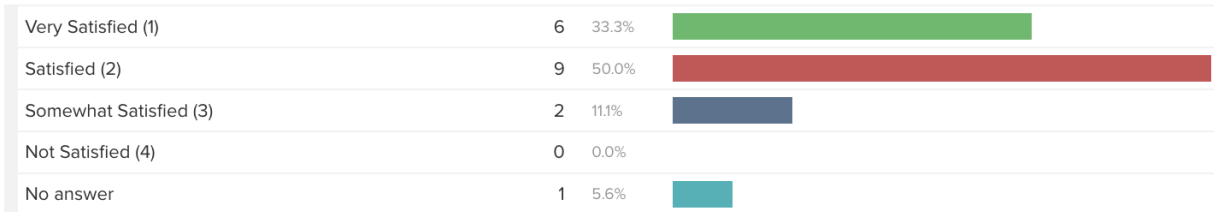
This is a multiple choice question. Respondents had to choose one of the following options: “Very Satisfied”, “Satisfied”, “Somewhat Satisfied”, “Not Satisfied”. Respondents who were answered that they were somewhat satisfied or not satisfied are prompted with a free-text box to provide further details to justify their answer.

Most respondents stated they were satisfied with the 4-week period (graph 4.11). This also applies to the one respondent who received Signature event funding. However, 50% of respondents who received meet-up funding stated they were very satisfied with the provided period, while 33% of them were somewhat satisfied. These 33% respondents were also the only respondents overall to state they were somewhat satisfied. There were no respondents who stated they were not satisfied with the period. The feedback they provided in order to justify why they were only somewhat satisfied is:

*Respondent 1: If the event is jointly hosted by multiple entities, it may need more time to collect the necessary information and prepare the detailed report.*

*Respondent 2: Usually it takes us more time to get the event pictures from the photographers*

Graph 4.11

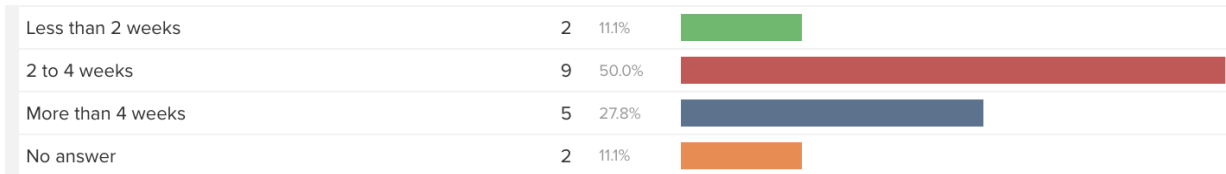


**Question 3:** How much time did it take to receive the money after you submitted the follow up materials?

This is a multiple choice question. Possible answers are: “Less than 2 weeks”, “2 to 4 weeks” and “More than 4 weeks”.

50% of respondents answered that it took them between 2 and 4 weeks to receive the funds, while only 11% received their funds in less than 2 weeks (graph 4.12).

Graph 4.12



One respondent stated that he has not yet received the funds, but it was only about 2 weeks after he submitted the required follow-up materials, so his answer might be inaccurate.

The one respondent who received Signature even funding did receive the funds in less than 2 weeks, while half of meet-up funding recipients received their funds in 2-4 weeks, 33% in more than 4 weeks, and the remaining 17% received the money in less than 2 weeks.

Additional feedback provided by attendees was received, provided below (unedited):

*Respondent 1: So, my only complain is about the follow-up document to describe the event. Before enter the platform, when I read the information needed, I have considered I should write a detailed descriptive doc to be uploaded, or in the worst case, a set of formal questions to be answered. But, surprisingly, it was just needed to fill out a one-line box, what I used to enter a link to a detailed pdf doc.*

*Explain a bit more about this doc requirement will be great, because it can save a lot of time on efforts.*

*Respondent 2: Sourcing for fund to executive big event is usually a challenge, hence the post event payment should be reconsider especially in situations when organizer don't have any other source of generating funds.*

*Respondent 3: Excellent job. With a common portal in place, it has never been easier. Impressed with how organized it is. Well done.*

*Respondent 4: The system is working properly and you are very responsive to the funding process. I believe after completion of submission, evaluation & funding transaction processes can be faster and better. Besides of having a standard template for event write-up, as optional, we should be able to import a detailed write-up (.doc or spreadsheet) which can contain analysis or other improvements to the system.*

## **Event Attendees Satisfaction Survey Review**

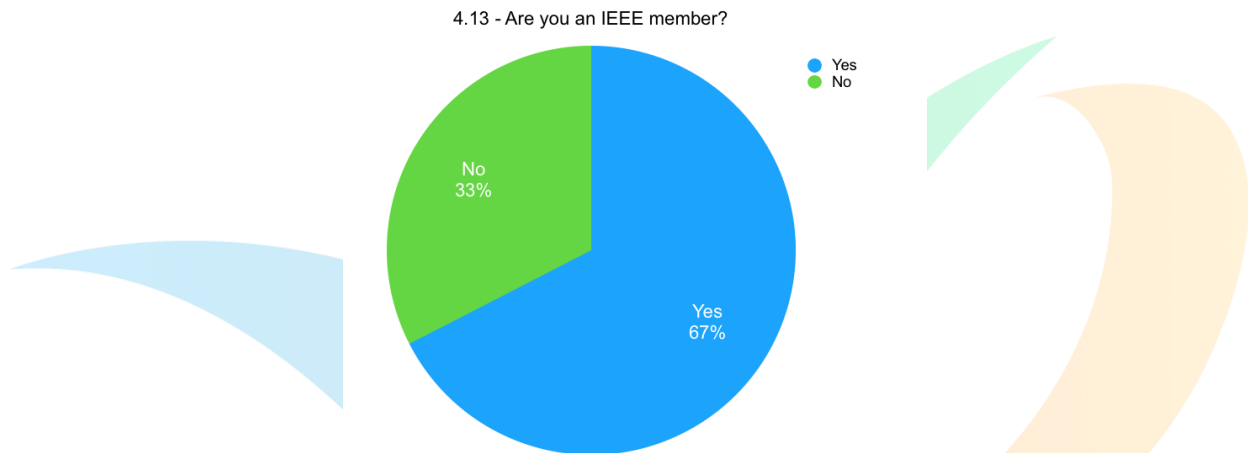
Event attendees satisfaction surveys were launched at the end of August 2017. All surveys contain the same set of 7 questions, and are distributed to the event organizers along with QR codes pointing to the webpage, and instructions on how the survey should be disseminated during and immediately after the event. Since the survey has been implemented rather recently, attendees' feedback from a total of 13 events. Out of these 13 events, 2 are meet-ups, 1 is a Signature event, 1 is a STEP event, and 9 are seed funded events. The survey results from seed funded events will be explored in detail in chapter 5, which is dedicated to seed funding. The imbalance regarding types of events is a result of the fact that the majority of meet-ups took place in the first half of the year, with the funding being depleted by the end of July. Similarly, two of the three Signature events that have already taken place were held before the event attendees satisfaction survey was launched. Seeing as seed funding is, at the time of writing this document, the only type of Young Professionals funding still left, the results of the survey discussed here will be predominated by seed funded events.

## Attendees background

**Question 1:** Are you an IEEE member?

Possible answers are “Yes” or “No”.

A little over two-thirds of attendees who filled in the survey are IEEE members (graph 4.13).

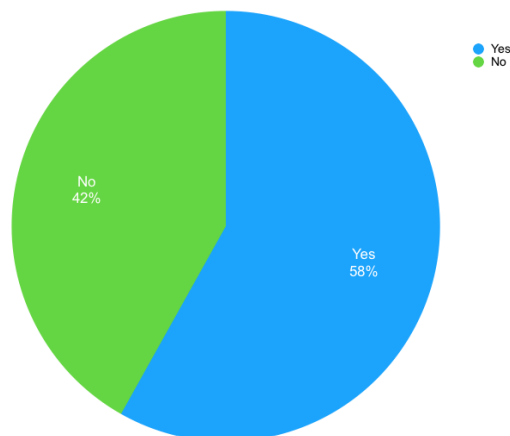


**Question 2:** Is this the first Young Professionals event you attend?

Possible answers are “Yes” or “No”.

Among survey respondents, 58% of them stated that it was their first time attending an IEEE Young Professionals event (graph 4.14). This is a strong indicator that both meet-ups and Signature events have a great potential to attract existing IEEE members who are not actively involved in IEEE Young Professionals-related activities, while also attracting participants who are not IEEE members.

4.14 - Is this the first IEEE Young Professionals event you attend?



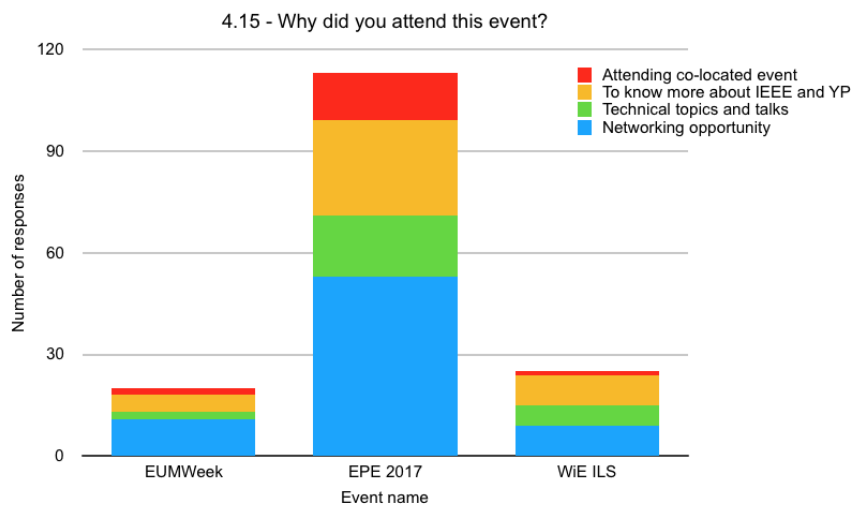
**Question 3:** Why did you attend this event?

Possible answers include: “Opportunity to network with experts and peers”, “Technical topics and talks”, “To know more about IEEE and IEEE Young Professionals”, “Attending other co-located



event”, or other (in which case the respondent is prompted to provide further details in a free-text box).

The most frequent reason quoted for attending the event is networking opportunity, followed by wanting to know more about IEEE and IEEE Young Professionals. Only three respondents overall quoted other reasons for attending the events (all from the EPE 2017 meet-up), explaining that they attended because it is a fun event, and generally enjoyable to be part of IEEE Young Professionals-led activities.



## Event overview

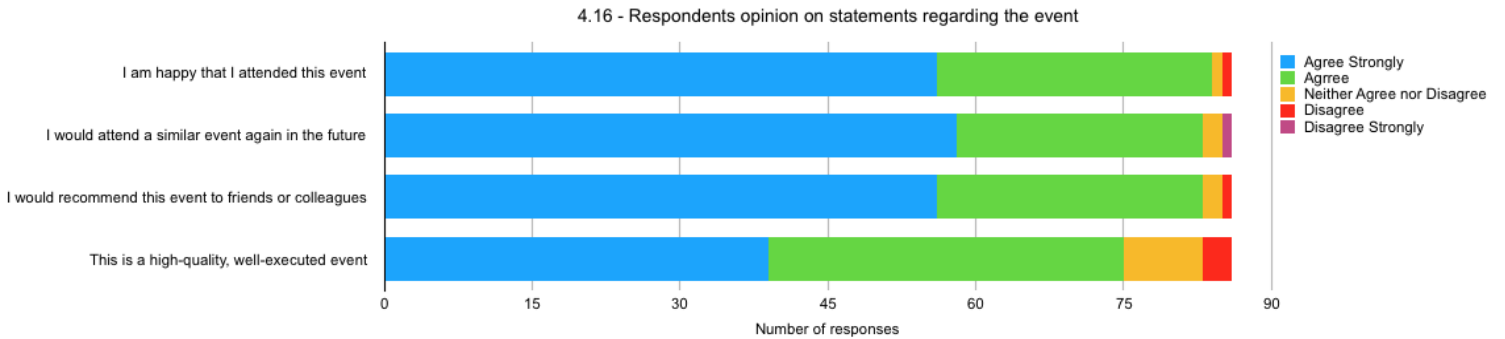
**Question 1:** Please rate the following statements: “I am happy that I attended this event”, “I would attend a similar event again in the future”, “I would recommend this event to friends or colleagues”, “This is a high-quality, well-executed event”.

Respondents can choose one of the following answers: “Agree Strongly”, “Agree”, “Neither Agree Nor Disagree”, “Disagree”, “Disagree Strongly”.

Overall, respondent agreed or strongly agreed with all statements presented, especially with the statement “I would attend a similar event again in the future” (graph 4.16). Negative responses, such as individuals disagreeing or strongly disagreeing with the presented statements are rare, and do not apply to all events.

One aspects to note is the relatively weaker opinion regarding the statement “This is a high-quality, well-executed event”, in which instance there are fewer respondents strongly agreeing, and a relatively higher proportion of respondents disagreeing. This is a matter that should be explored further, and try to understand what has prompted attendees to have this opinion, in addition to what their expectations of Young Professionals Signature events and meet-ups are.

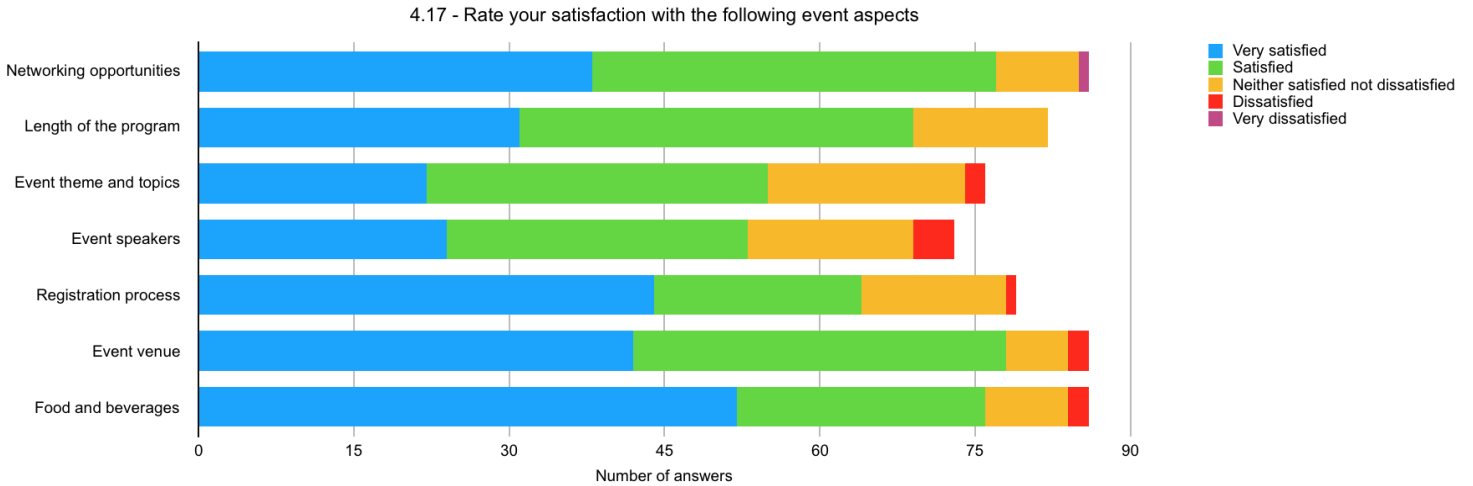
Nevertheless, the positive opinions are overwhelming, suggesting that such events have a significant potential in attracting both IEEE members and non-IEEE members, both experienced and inexperienced members (or less active ones), and still provide an enjoyable experience for all of them.



**Question 2:** Please rate your satisfaction with the following aspects of the event: networking opportunities, length of the program, event theme and topics, event speakers, registration process, event venue, food and beverages.

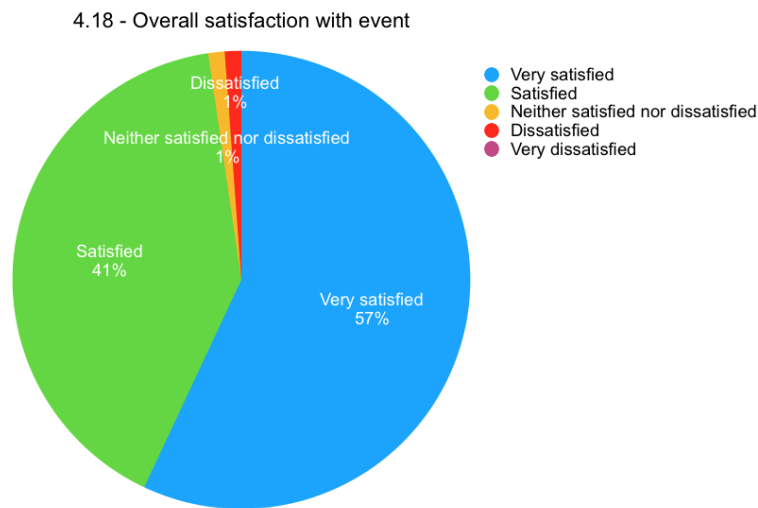
Respondents can choose one of the following answers for each event aspect: “Very Satisfied”, “Satisfied”, “Neither Satisfied Nor Dissatisfied”, “Dissatisfied”, “Very Dissatisfied”, or “N/A”. The “N/A” option was introduced since not all events have a theme or a speaker, for example.

Overall, the vast majority of attendees from both meet-ups and the Signature event are either satisfied or very satisfied with the various aspects of the event they had to rate (graph 4.17). Networking opportunities, registration process, and food and beverages are the best rated aspects overall. Event speakers has a slightly higher frequency of dissatisfied answers, while event theme and topics has the lowest rate of very satisfied replies. There are fewer responses for these two aspects since not all events have speakers or themes.



**Question 3:** Taking into account all aspects of the event, how satisfactory was the event for you? Respondents can choose one of the following answers: “Very satisfied”, “Satisfied”, “Neither dissatisfied nor satisfied”, “Dissatisfied”, “Very Dissatisfied”.

An astounding 98% of survey respondents were either satisfied or very satisfied with the event they attended, which is an extremely positive result to see (graph 4.18). While both meet-ups and Signature events are new concepts for Young Professionals and their models still need improvements, observing such high rates of satisfied participants is an encouraging factor, providing concrete proof of the potential such events have to improve the membership experience of young IEEE members, as well as attract non-IEEE members who can join the organization.



## Challenges faced currently

Based on collected data we recognized a few issues related to our Signature event funding project. Compared to Meet-up events, the Signature events present rather poor attendance. Also cooperation with large non-IEEE conference organizers is limited due to mismatch in organizing cycle of big events and financial cycle of IEEE. Basically, large events are organized in at least 1-2 years advance. Unfortunately, we are not able to make any commitments and be reliable partner since our budget is approved at the end of the year.

Although the feedback provided by the participants indicates that the signature events are successful, we in-depthly investigated the problem and decided to apply the follow measures to assure that Signature events serve their purpose:

- Relocate part of the funding to Meet-up
- Recognize 2-3 large events, recognize engaged and experienced local volunteers and coordinate the efforts to assure high attendance and quality of the events
- Provide to local organizers the guide that help them to organize large scale successful event
- Start early low-commitment collaboration with large event organizers (already initiated for SXSW)
- Tighten collaboration with Public Visibility Committee to be present at large scale non-IEEE events
- Apply additional measures for early detection of unsuccessful events

## Financial status

Large scale events	Funding approved (1 <sup>st</sup> Nov.)	Total funding
<b>Meet-up</b>	\$29,560	\$30,000
<b>Signature events</b>	\$20,178	\$20,000
2017 Approved	50K	
FYE 2017 Forecasted	50K (additional applications and opportunities to partner)	

## 5. Seed funding

### Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
<ul style="list-style-type: none"> <li>✓ <i>Finalize funding platform</i></li> <li>✓ <i>Marketing campaigns</i></li> </ul>	<ul style="list-style-type: none"> <li>✓ <i>Evaluate funding platform usage and needed adjustments or changes</i></li> </ul>	<ul style="list-style-type: none"> <li>✓ <i>Report on usage and projections</i></li> <li>✓ <i>Launch user experience surveys</i></li> </ul>	<ul style="list-style-type: none"> <li>✓ <i>Deliver impact report to Boards</i></li> <li>✓ <i>Analysis of seed funding impact</i> <ul style="list-style-type: none"> <li>• Make needed adjustments to seed funding criteria</li> </ul> </li> </ul>

### Current status overview

Seed funding has been perhaps the more challenging project in terms of Young Professionals funding for 2017, which has been attributed to its new concept that has never been done before in IEEE Young Professionals, and local volunteers' difficulty in understanding the funding criteria. Similarly, many events that request funding fit the requirements of several types of funding; because of this, in some cases the type of funding granted to an event is decided based on the required amount of funds.

Nevertheless, seed funding has become increasingly popular since August 2017, when its description has been clarified on the funding portal, and volunteers have become more accustomed to its concept. With enhanced visibility campaign and promotion to local Young Professionals groups of interest, seed funding applications are projected to increase drastically in 2018.

### Milestones and Checkpoints

Month	Checkpoint/milestone reached	Description
<b>July</b>	<ul style="list-style-type: none"> <li>• Set up survey for event attendees</li> <li>• Increase visibility of seed funding</li> </ul>	<ul style="list-style-type: none"> <li>• The event attendees satisfaction survey was launched in August 2017, and contains 7 questions. The survey is being distributed to all seed funded events taking place since August.</li> </ul>
<b>September</b>	<ul style="list-style-type: none"> <li>• Use up all seed funding for 2017</li> </ul>	<ul style="list-style-type: none"> <li>• As of the time of writing this report, about 50% of available seed funding has been issued.</li> </ul>

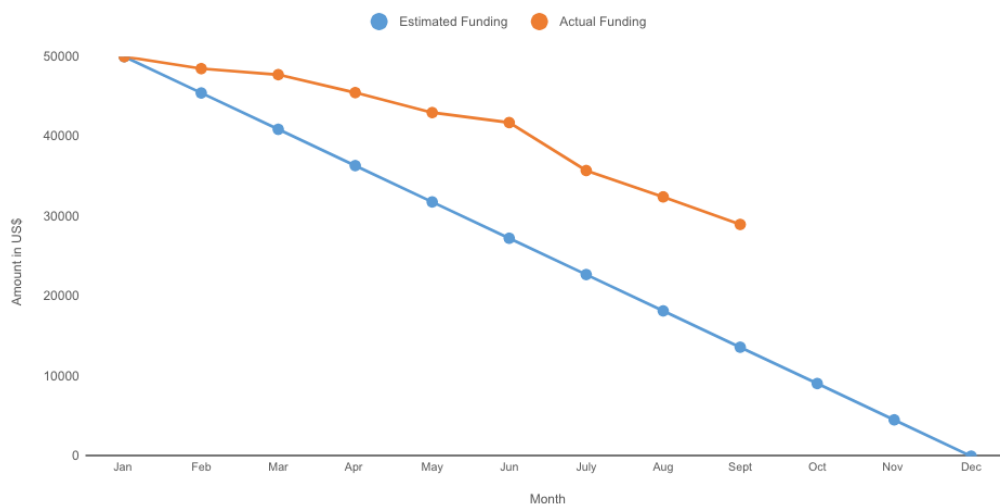
## Success metrics and deliverables progress and achievements

This section details the success metrics and deliverables for 2017, as agreed upon and presented to the MGA Board at the June Board Series 2017. The name or title of the success metric or deliverable is presented in **bold**, followed by a short description and status review in detail.

1. **Seed funding requests**: depletion of all seed funding by the end of September 2017 - this means a total of 66 seed funding applications approved, should all of them receive the maximum funding of US \$750.

Seed funding was slow to begin with, with a limited number of events funded until May 2017, as seen in graph 5.1. The amount of funding issued increased however from June onwards, and has seen a significant positive change ever since. All events funded received the maximum amount of funding available (US\$750).

Graph 5.1 - Seed funding issued per month in 2017

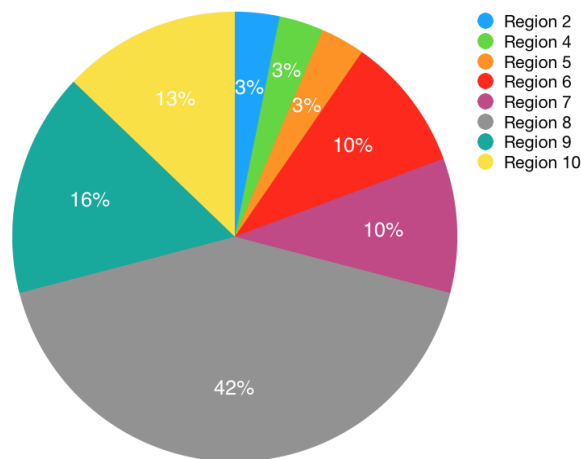


The majority of seed funding requests came from Region 8, however seed funding attracted more USA Regions, namely Region 2 and Region 4, which did not apply for any other type of Young Professionals funding during 2017 (graph 5.2). At the time of writing this report, 32 events benefit of seed funding, out of which 20 have already taken place, namely:

- Workshop: Upgrading Research Skills, Republic of Macedonia, Region 8
- 10th editon of IEEE Elevate event, Croatia, Region 8
- IEEE Ideation to Productization, Bangalore, Region 10
- Young Professionals Career Development Workshop, Hungary, Region 8
- YP Rio Seed Funding 2017, Brazil, Region 9
- YP Invited Talk: Publication Etiquette & Ethics at COMPSAC17, Italy, Region 8
- YP networking event, Chicago, Region 4
- First Nano-Bootcamp Young Professionals, Colombia, Region 9

- Energy and CleanTech Pitch Event, Santa Clara, Region 6
- Middle East Student & Young Professionals Congress 2017, Tunisia, Region 8
- Robotsav 2017, Kerala, Region 10
- YP Partnership with Start-up Grind, Seattle, Region 6
- YP Industry Talks, South Brazil, Region 9
- IEEE Day in Montreal, Montreal, Region 7
- Africa Student and Young Professionals Congress 2017, Nigeria, Region 8
- WESCIS, Argentina, Region 9
- Spokane YP kickoff event, Spokane, Region 6
- SS12 Project & Maker Faire, Hyderabad, Region 10
- Serbia first YP event, Serbia, Region 8
- Turkey SYP Congress, Turkey, Region 8

Graph 5.2 - Seed funding approved per Region



2. **Funded events details:** at least 3000 participants will attend seed funded events throughout the world.  $\frac{2}{3}$  of these attendees (2000) should be IEEE members.

Attendance can only be calculated based on submitted required follow-up materials, meaning the numbers presented here are based on the 20 events that have already taken place and submitted the follow-up materials.

Based on these 20 events, a total of 1979 attendees took part in the events. Out of these, 1186 were IEEE members, and 793 were not IEEE members. While the total number of attendees at held seed funded events represents 66% of this year's goal number of attendees, half of all seed funded events are yet to take place. This suggest that by the end of December 2017, the goal number of attendees at seed funded events will be fulfilled, if not even surpassed. The current trend suggest that this type of events attracts a great level of interest from non-IEEE members, thus possibly surpassing the goal of 1,000 non-IEEE members attending seed funded events in



2017. This factor is also supportive of the concept of seed funding, since one of the fundamental objectives of this project is recruitment of new members, by increasing the amount of non-IEEE members who become acquainted with IEEE. Taking part in such events is an ideal way for interested individuals to gain first-hand experience of IEEE and IEEE Young Professionals especially, leading to an increase in the amount of young IEEE members, and a boost in the vitality of local Young Professionals groups and communities.

3. **Event organizers satisfaction survey results:** at least 80% of Young Professionals who have applied for funding will be satisfied or very satisfied with the official funding application platform. The first round of surveys to measure user satisfaction is scheduled to start in the beginning of June 2017.

Although the event organizers satisfaction survey was released, with a slight delay, in August, to date 6 organizers of seed funded events have provided their feedback. All of them stated their experience with the funding application platform was positive, fulfilling the success metric. Results from this survey will be discussed in detail in the following section, entitled “Event Organizers Satisfaction Survey Review”.

4. **Event attendees satisfaction survey:**
  - a. A minimum of 60% of attendees who reply to the survey should be satisfied or very satisfied with the event.
  - b. At least 75% should agree to the statement that participating in such an event will most likely increase their interest in IEEE, and possible engagement with the organization in the future.

Results from this survey will be discussed in detail in the section entitled “Event Attendees Satisfaction Survey Review”, further on in this chapter.

## **Event Organizers Satisfaction Survey Review**

The event organizers survey consists of 13 questions assessing a variety of factors, such as funding platform performance, pre-event application requests, and post-event required follow-up material. Since the survey is described in detail in chapter 4 in the relevant section, this section will provide only the information relevant to seed funding. Overall, 6 survey respondents received seed funding, two of whom also used STEP funding.

### **Funding platform review**

Two main questions aim to assess applicants’ opinion regarding the funding application platform, detailed below.

*Question 1:* How would you rate your experience of the funding application platform?

This is a multiple choice question, where respondents can choose one option between “Excellent”, “Very Good”, “Good” or “Poor”.

Seed funding recipients were most likely to rate their experience of the funding application platform as “Very Good”, followed by “Good”, and “Excellent”. There were no responses to indicate any respondent had a poor experience of the platform.

*Question 2:* Did you ever face and technical issues on the funding platform?

This is a yes or no question, with respondents who answer “yes” being prompted to provide further details in a free-text box.

One respondent who received both STEP funding and seed funding stated they encountered technical issues with the platform, yet as mentioned in the extensive survey review in section 4, the detailed comments prove that there were, in fact, no technical issues. Otherwise, the remaining respondents who used seed funding stated they did not encounter any technical issues or difficulties while using the funding request platform.

### **Pre-event process feedback**

One question addressed the pre-event process, including aspects such as submitting a funding application and the timeframe required.

*Question:* The current funding process requires to submit funding applications at least 4 weeks prior the event. How do you evaluate this time frame?

This was a multiple choice question, where respondents could choose one of the following answers: “Quite enough time”, “Need a week more”, “Need two weeks more” or “2 Months will be perfect!”.

All seed funding recipients stated that 4 weeks is indeed enough time to submit all the required materials for the funding application.

### **Post-event feedback**

The survey provides three questions which address aspects of the post-event process, such as time to submit the required follow-up material and transfer of funds.

*Question 1:* Were you able to submit the required follow-up material on time after the event?

This is a yes or no question.

All respondents who received seed funding stated that they were able to submit the required follow-up material within the 4-week deadline.

*Question 2:* Are you satisfied with four weeks time window for the follow-up material to be submitted after the event?

This is a multiple choice question. Respondents had to choose one of the following options: “Very Satisfied”, “Satisfied”, “Somewhat Satisfied”, “Not Satisfied”. Respondents who were answered that they were somewhat satisfied or not satisfied are prompted with a free-text box to provide further details to justify their answer.

67% of respondents who received seed funding stated they were satisfied with the 4-week period, while the remaining 33% said they were very satisfied.

*Question 3:* How much time did it take to receive the money after you submitted the follow up materials?

This is a multiple choice question. Possible answers are: “Less than 2 weeks”, “2 to 4 weeks” and “More than 4 weeks”.

80% of seed funding recipients stated they received their funds in 2 to 4 weeks, while the remaining 20% received them in less than 2 weeks.

### Event Attendees Satisfaction Survey Review

Event attendees satisfaction surveys were used to date in a total of 9 seed funded events, collection feedback from a total of 186 individuals. The answers are detailed below, divided by category and question.

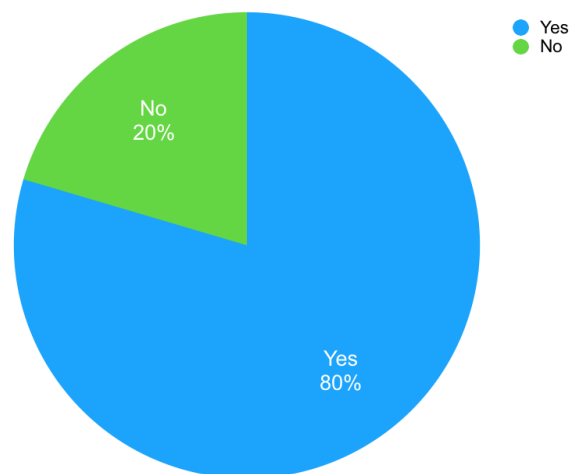
#### Attendees background

*Question 1:* Are you an IEEE member?

Possible answers are “Yes” or “No”.

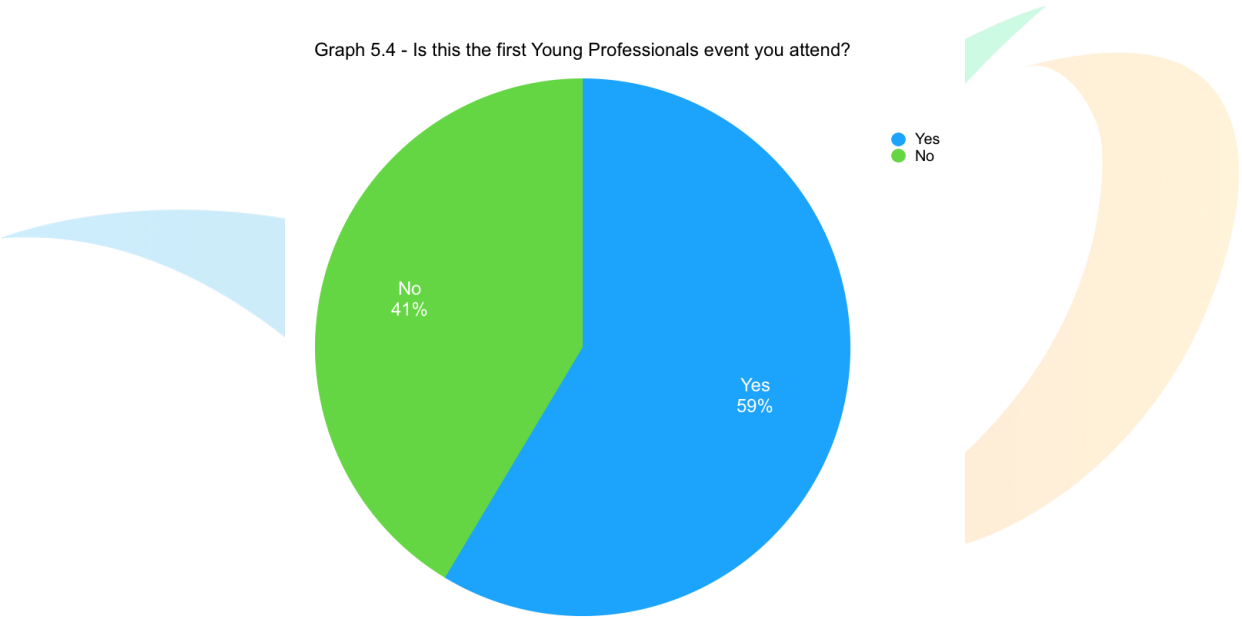
The vast majority of survey respondents are IEEE members (graph 5.3). While the proportion of attendees who answer the feedback survey is positive, it should be considered how non-IEEE members who attend such events can be encouraged to provide their opinion regarding the event, in order to better understand what their needs and expectations are.

Graph 5.3 - Are you an IEEE member?



**Question 2:** Is this the first Young Professionals event you attend?  
Possible answers are “Yes” or “No”.

Interestingly, almost two thirds of the survey respondents stated that this was the first Young Professionals event they have attended (graph 5.4), which is an indicator that seed funded events are achieving their intended objective of attracting IEEE members who have previously not been involved or active in Young Professionals events or activities.

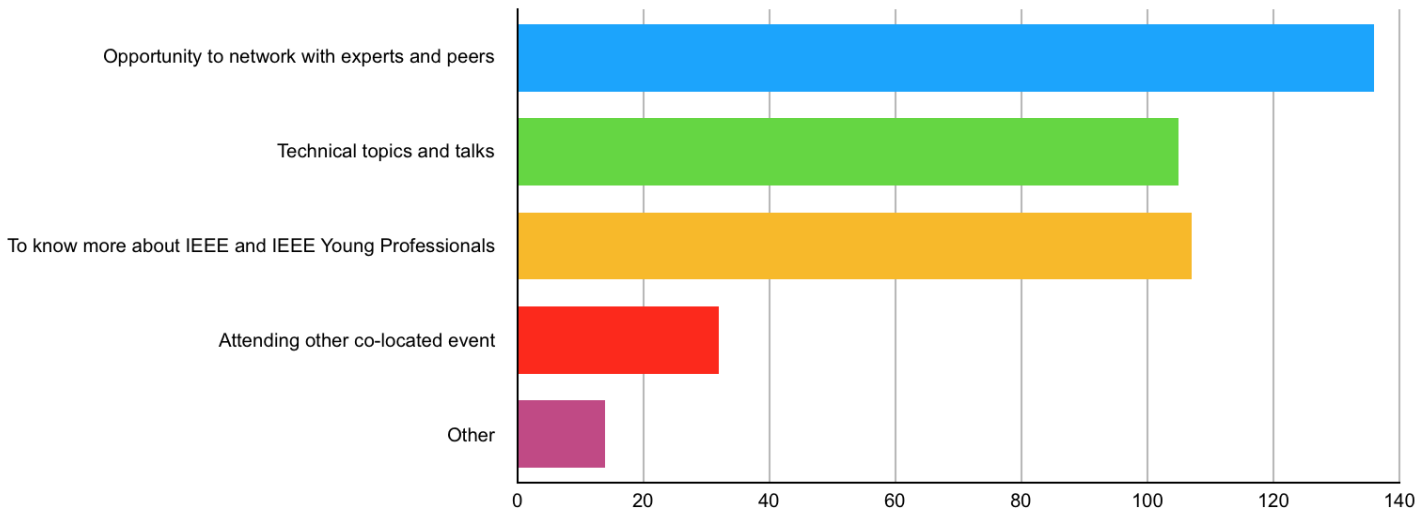


**Question 3:** Why did you attend this event?  
Possible answers include: “Opportunity to network with experts and peers”, “Technical topics and talks”, “To know more about IEEE and IEEE Young Professionals”, “Attending other co-located event”, or other (in which case the respondent is prompted to provide further details in a free-text box).

As with meet-ups and signature events, the main reason for people attending a seed funded event is networking opportunities (graph 5.5). However, in comparison to meet-ups and signature events, more people quoted other reasons for attending. These reasons include:

- understand what volunteering opportunities exist and how Young Professionals operate;
- attend a high quality event without the need to travel;
- quality speakers;
- professional development talks;
- industry involvement;
- bridge the gap between various local IEEE OUs;
- Learn how to make a positive impact on the local community;
- Innovative event or event topic;
- Attended as companion.

Graph 5.5 - Why did you attend this event?



## Event overview

**Question 1:** Please rate the following statements: “I am happy that I attended this event”, “I would attend a similar event again in the future”, “I would recommend this event to friends or colleagues”, “This is a high-quality, well-executed event”.

Respondents can choose one of the following answers: “Agree Strongly”, “Agree”, “Neither Agree Nor Disagree”, “Disagree”, “Disagree Strongly”.

The general opinion of survey respondents was positive, with the majority either strongly agreeing or agreeing to the statements. Below is a breakdown of percentage of positive answers per statement:

- I am happy that I attended this event: 95% of respondents either agree strongly or agree
- I would attend a similar event again in the future: 94% of respondents either agree strongly or agree
- I would recommend this event to friends or colleagues: 94% of respondents either agree strongly or agree
- This is a high-quality, well-executed event: 87% of respondents either agree strongly or agree

Having 94% of respondents agreeing or strongly agreeing that they would attend a similar event in the future leads to the fulfillment, and significant surpassing, of the success metric related to having at least 75% of event attendees interested in participating in IEEE and Young Professionals related activities in the future.

**Question 2:** Please rate your satisfaction with the following aspects of the event: networking opportunities, length of the program, event theme and topics, event speakers, registration process, event venue, food and beverages.

Respondents can choose one of the following answers for each event aspect: “Very Satisfied”, “Satisfied”, “Neither Satisfied Nor Dissatisfied”, “Dissatisfied”, “Very Dissatisfied”, or “N/A”. The “N/A” option was introduced since not all events have a theme or a speaker, for example.

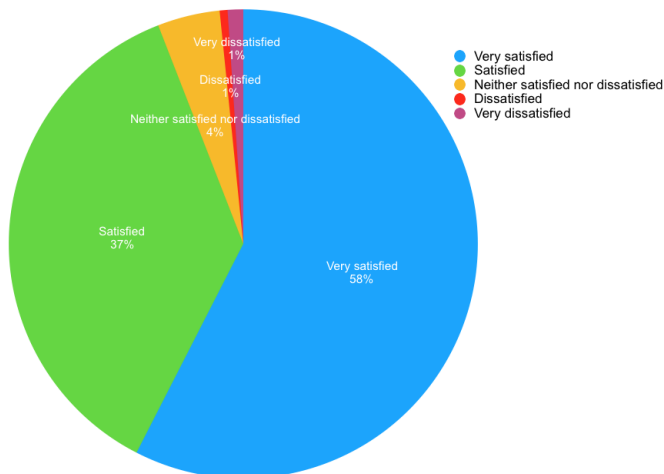
The feedback provided by respondents to this question was overwhelmingly positive, with event speakers and networking opportunities receiving the highest satisfaction rates. Below, the satisfaction rates are detailed per question item:

- networking opportunities: 87.63% satisfied or very satisfied
- length of the program: 86.55% satisfied or very satisfied
- event theme and topics: 86.55% satisfied or very satisfied
- event speakers: 89.78% satisfied or very satisfied
- registration process: 86% satisfied or very satisfied
- event venue: 86.02% satisfied or very satisfied
- food and beverages: 79% satisfied or very satisfied

**Question 3:** Taking into account all aspects of the event, how satisfactory was the event for you? Respondents can choose one of the following answers: “Very satisfied”, “Satisfied”, “Neither dissatisfied nor satisfied”, “Dissatisfied”, “Very Dissatisfied”.

Looking back at success metrics for seed funding for 2017, one of them states that at least 60% of survey respondents should be either satisfied or very satisfied with the event. Based on the data collected so far, almost 95% of respondents stated they are either satisfied or very satisfied with the event they attended (graph 5.6, percentages are rounded up).

Graph 5.6 - Overall, how satisfied are you with the event?



### Challenges faced currently

- The only concern the project is facing currently is the low funding utilization which is associated with limited marketing and high requirements for submitted applications.

### Financial Status

	Funding approved (1 <sup>st</sup> Nov.)	Total funding
<b>Seed funding</b>	\$24,750	\$50,000
2017 Approved	50K (MGA)	
FYE 2017 Forecasted	25K (projected based on middle year usage)	